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Bosnia-Herzegovina

Exporter Guide

Annual Report

2006

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Report Highlights:

Bosnia and Herzegovina (BiH) imports around two thirds of its overall food needs. The market for processed foods focuses on value rather than quality as consumers seek to obtain the most for their money. Food import tariffs are low compared to the tariffs in other countries in the region. Challenges to exporters include a complicated dual system of government, low incomes, and poor infrastructure. This report contains marketing tips, information on importing foods, and important points of contact.

Includes PSD Changes: No
Includes Trade Matrix: No
Unscheduled Report
Vienna [AU1]
[BK]

I. Market Overview

Economic situation

The economy in Bosnia and Herzegovina (BiH)¹ is still recovering from the 1992-1995 war and from the transition from a socially planned to a market economy. In recent years the economy has been driven by donations from the international community and Gross Domestic Production (GDP) growth reflected more the inflow of external assistance than an increase of domestic production. Per capita GDP in 2004 has been estimated at approximately US\$ 2,150, with a total estimated nominal GDP of approximately US\$ 8,2 billion. The real GDP growth rate in 2004 was 6%. According to official figures, BiH ran a current account deficit of approximately 20 percent of the country's GDP. The average net monthly wage in 2004 was \$313 (this figure is higher in the Federation than in the Republika Srpska).

A degree of macro-economic stability has been achieved with the introduction of a Central Bank, adoption of the currency board and creation of a single currency, the Konvertibilna Marka (Convertible Mark, KM). The currency board ensures that KM is fully backed by hard currency or gold, and the exchange rate is fixed at approximately 2 KM to the Euro. Therefore, prices in BiH have remained stable since the introduction of the KM. Inflation in 2004 was only 0.4%, a rate that has remained steady in 2005.² At the end of 2003, the entities ceded authority over all indirect taxes to the State-level government, which ultimately resulted in a single Value-Added Tax (VAT) of 17% for the whole country introduced on January 1, 2006.

Structure of the economy

The structure of the BiH economy is changing quite slowly. GDP composition by sector in 2004 was: agriculture 14.8%, industry: 31.9%, services: 53.3%. Industrial production growth rate in 2004 was around 9%.

Although there has been a significant growth in the number of registered micro, small and medium enterprises, economic activity is still characterized by the existence of large state owned enterprises. These large enterprises operate with significant losses, at less than full capacity, and with out-dated technology and management techniques. The private sector share is currently around 50%, slowly taking the lead.

The official unemployment rate remains high, above 40%. It is estimated that an actual unemployment is around 20%, because of the black economy existence.

Business environment

BiH is composed of two entities with significant differences with regard to the business environment. Although there has been an effort to create a single market in BiH, significant legislative, regulatory and institutional differences between the Entities persist. Between the two entities, factors such as business registration requirements and most taxation are separate and different. The creation of a single economic space is a precondition for the regeneration of the post-war Bosnian economy, the transformation from a planned to a

¹ According to the Dayton Peace Agreement signed in December 1995, Bosnia and Herzegovina (BiH) is divided into two Entities: the Federation of Bosnia and Herzegovina (F BiH) and Republika Srpska (RS). There is also the Brcko District with a special administrative status. Understanding this dual governmental structure is important to doing business in the country.

² Sources: Central Bank of Bosnia and Herzegovina and Country Commercial Guide

market economy, and greater integration into European and world trade structures. Significant barriers to internal and external trade and foreign direct investment remain, and there are weaknesses in the legal base related to competition, public procurement, financial services, standards and regulations, and the regulation of essential services.

Foreign Trade

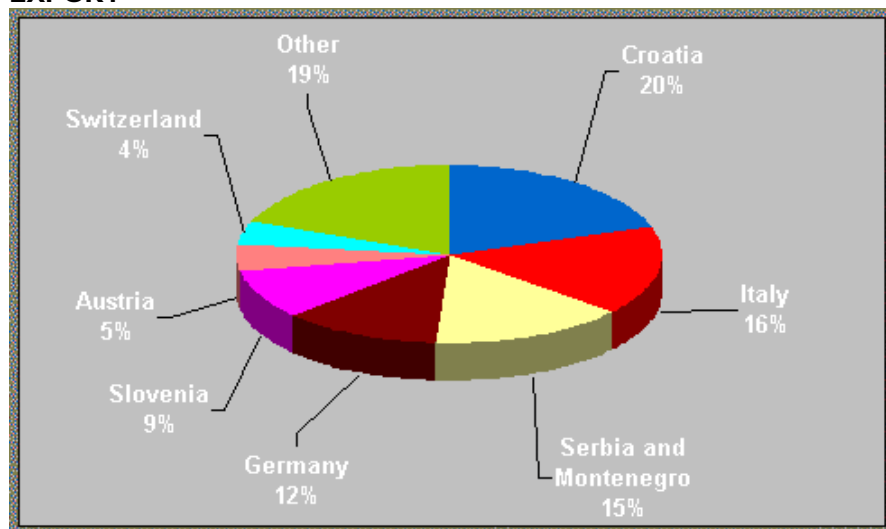
In 2004, for every dollar of exports, BiH took in more than three dollars in imports. Total exports grew from \$730 million to \$2,050 mil. from 1998 to 2004, while imports rose from \$4.157 million to \$6.545 million in the same period. Agricultural imports represent about 25% - 30% of total imports, and about 5% of total exports. Efforts have been made recently to liberalize trade, especially within the Southeast European region. Bilateral free trade agreements have been signed with many countries in the region (Croatia, Serbia and Montenegro, FYR Macedonia, Albania, Romania, Bulgaria, Moldova and Turkey) in the framework of an intra-regional trade co-operation. The principal trading partners are the European Union (EU) and the countries of ex-Yugoslavia.

Trade volume, million \$	1998	1999	2000	2001	2002	2003	2004
Exports	730	954	1,499	1,550	1,428	1,592	2,050
Imports	4,157	4,737	5,167	5,594	5,736	6,080	6,545

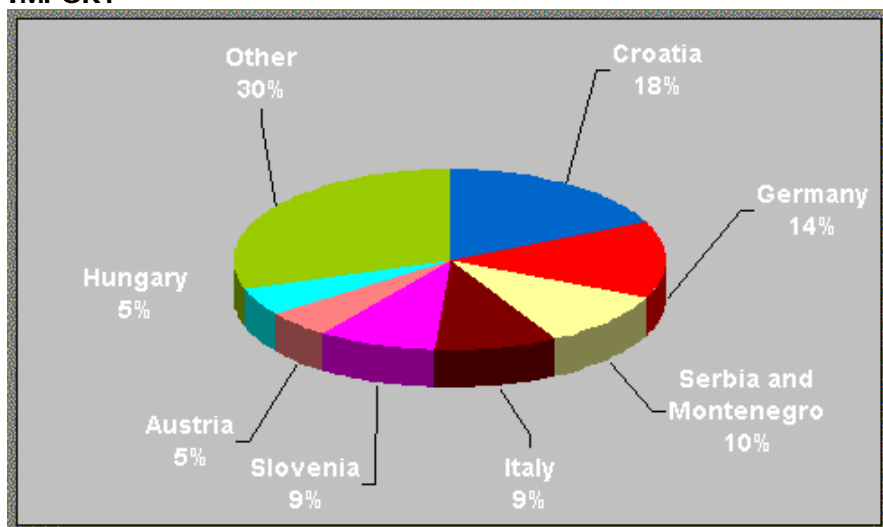
Source: Central Bank of BiH

Major BiH trade partners (year 2004):

EXPORT



Source: FIPA and Central Bank of BiH

IMPORT

Source: FIPA and Central Bank of BiH

Croatian, Slovenian, German, Serbian, Austrian and Italian processed food products dominate the market. The most imported food products are beverages (alcoholic and non-alcoholic) and mineral water, grains, tobacco products, sugar and dairy products.

Imports of U.S. consumer oriented products and seafood products to BiH are minor. Imports of U.S. origin bulk commodities (mostly wheat and sunflower seed oil) are part of a U.S. food donation program to BiH.

BiH is not a member of the World Trade Organization (WTO) but has started accession negotiations.

Size and Growth of Consumer Foods Market

Unfortunately, there has been no information on size and growth of the market.

Market Opportunities for High-Value Consumer Foods/Beverages and Edible Fishery Products

Challenges to Marketing High Value U.S. Foods in BiH:

- The weak economy affects consumer-purchasing power. An average net wage is lower than in any country in the region and the unemployment rate is high. Therefore, people are more interested in price than in quality;
- Quality control among locally produced and imported products is often poor in part because BiH government laboratories work with out-dated technology and are ill-equipped. Therefore, labeling requirements are often not met and low-quality products may be found on market at that undercut other products;
- There is still a lot of smuggling;
- Fraud and corruption are still a problem, especially in relation to taxation and import duties.

However, high quality U.S. products could find small, but growing market due to the fact that consumers awareness is improving and eventually will result in spending more money on high quality food products. Californian wines (lower quality) and almonds are already present on the market

Food Expenditures and Consumption

It is estimated that a four-person family spends around \$3,500 annually (2003 est.) on a 'basket' of basic food products. However, the general opinion is that the actual figure is being much higher and there are no reliable official statistics on food consumption. Officially, changes in food expenditures are not significant because the 'basket' of basic food products is always the same and the retail prices are quite stable.

Since an average monthly income is around \$300, an average pension around \$100 (2004), with the official unemployment rate around 40%, many do not have enough money to buy food. According to World Bank's poverty reduction strategy paper, one fifth of total BiH population is on the edge of poverty.

Demographic Developments and Impact on Consumer Buying Habits

BiH has a population of around 4 million and an average BiH household is composed of 3.6 members. A single parent heads slightly over one in ten households. The population growth rate is about 0.7% (2003 est.).

The rural population decreased significantly as the result of the war. Most of the rural population moved to urban areas or went to other countries as refugees and have been slow to return. In some areas, landmines remain a barrier to agricultural production although there is a significant international demining effort.

The number of single households has not increased significantly because many of young people live with their parents. People are also waiting longer before they have children because of difficult economic situation and housing problems.

Advantages and Challenges for the U.S. Exporters

Advantages	Challenges
Insufficient domestic food production, imports nearly three times larger than exports	Long distance, bad transportation conditions, absence of highways, limited railway service
Increased urban population	Weak economy affects consumer purchasing power, low average net wage, high unemployment rate
High quality of U.S. products	Consumers more interested in price than in quality
Import duties low if compared to other counties in the region	Illegally imported and low-quality products compete with legitimately imported foods
Relatively low costs for introduction and promotion of new products using local broadcast and print media or in-store promotions	Different distribution systems in the two Entities, different taxation system; difficulties in finding a reliable and capable local partner to carry out marketing and distribution
Increasing number of large retail supermarkets	Domestic market flooded with products imported from ex-Yugoslavia neighboring countries (FTAs) and EU countries
Fascination with American culture (language, music, TV shows, fashions) carries over to American food, such as famous "Coca Cola"	Reservations towards GM foods due to a lack of consumer education on the subject and a desire to meet EU requirements

II. Exporters Business Tips

Local business customs

Importers/wholesalers/distributors provide transportation, product storage, market information, financing, and some insurance.

Finding an agent and/or distributor is the most effective way to market consumer goods. The U.S. Foreign Commercial Service can help you locate qualified distributors. For more information, please see: <http://www.buyusa.gov/bosniaandherzegovina/en/>

The distribution systems are different for the F BiH and the RS because of differing legal frameworks. There have been efforts lately to harmonization rules between the two entities and currently the differences are related mostly to the Entities' tax regimes. It is often necessary to develop relations with distributors in both Entities in order to cover the whole country.

Some foreign companies have established a representative office in order to control distribution channels (e.g. P&G and Wrigley's). Wrigley's relies on three distributors and a number of small jobbers to penetrate the market. The company also has sales offices across the country to coordinate marketing efforts. Some companies rely on strong local companies to control distribution channels. Local companies prefer to do business with people they know well. Business friendships are highly valued. Establishing a local presence and employing local people signal long-term commitment to the market, and are well received (Country Commercial Guide).

General Consumer Tastes and Preferences

Generally speaking, most consumers view price as the primary factor in their food purchasing decision. Preferences tend toward large packages at lower prices. Shopping centers are becoming an increasingly popular retail food sales point. Most of people usually buy nonperishable foods at large supermarket centers once or twice a month. Perishable foods, fruits, vegetables, bread and fresh meat are usually bought at small grocery stores, specialized stores or green markets.

Consumption of red meats is relatively high and has been increasing lately because of the outbreak of avian flu in Europe and particularly neighboring Croatia. There are ongoing outbreaks of animal diseases such as Q fever and classical swine fever although these outbreaks do not appear to have shaken consumer confidence. BSE and FMD have not been reported in BiH. Traditionally, consumption of beef and veal is the higher than poultry, pork or lamb. Pork consumption is much higher in the RS than in the F BiH because of F BiH's large Muslim population.

A typical Bosnian meal is composed of either red or white meat, potatoes and some other vegetables. Rice is a common dish that on average is eaten once a week. Apples are the most popular fruit. There are only few ethnic restaurants (e.g., Italian, Chinese, Mexican). Fish consumption is traditionally low (around 2 kilograms/year).

The demand for organic foods is quite low. Imported organic foods are usually sold in specialized stores, and are consumed by the ex-patriot community and as a pseudo-medicinal treatment for the sick.

Consumers generally dislike genetically modified (GM) foods. Advanced consumers think that they don't have enough information to be pro or against biotech products, and that they need more education in order to decide whether or not they'll consume them. More information could change consumer attitudes towards biotechnology in a positive direction. Additionally, more knowledgeable consumers say they would eat biotech foods after proper testing and labeling, so they could decide whether they want to buy such a product.

In general, most people prefer to prepare meals at home from fresh food items than buy ready-to-eat and frozen meals. There is the belief that fresh cooked food is healthier and that frozen ready to eat foods are overpriced. Supermarkets do offer ready to eat meals but at relatively high prices.

There is a small but well off market segment made up of all of the foreigners in BiH (especially in Sarajevo and Banja Luka) that work for foreign humanitarian and military organizations.

Food Standards and Regulations

Please refer to FAIRS Report [BK 5007](#) (this report may be downloaded from <http://www.fas.usda.gov/scripts/attacherep/default.asp>).

General Import and Inspection Procedures

Foreign exporters can import food products into BiH using a locally registered office or a local company/shipping agency registered for import activities. It is common for agents to help with food import regulations.

Prior import approvals and licenses are required for live animals and animal products and seeds and pesticides. For animals and animal products the State Veterinary Administration (SVA) provides final approvals. For seeds, planting materials and pesticides the entities' agriculture ministries provide prior approvals and MOFTER issues import licenses. Forms are

available at the SVA and the Agricultural Ministries (see Key Contacts and Further Information). It is important to note that requirements for prior import approvals differ between the two Entities.

All food products must be accompanied with standard documents that follow each shipment and by health certificates issued by relevant authorities of exporting countries (e.g. veterinary certificate for meat and meat products, phyto-sanitary certificates for fruits, vegetables, seeds etc.) and are subject to veterinary and phyto-sanitary inspections at border crossings and sanitary and market inspections at customs points.

A GMO free certificate or a GMO-related statement included in the health certificate is often required for grains and similar products. That's because the new food law, which was adopted in November 2004, has introduced a moratorium on GMOs imports because of absence of regulating authority and detailed regulation.

Sanitary inspectors visually inspect all food for sanitary wholesomeness prior to customs clearance visually and take samples for laboratory tests (Appendix II). Imported goods are held at the customs point until testing is complete.

Market inspectors issue the quality certificates at inspection points (see Appendix I). Quality control inspections are done at the exporter/importer's written request, which should be received at least 24 hours prior to the customs clearance. The request for quality control must be accompanied with basic documents that follow each shipment, translated into Bosnian/Croatian for the F BiH or into Serbian for the RS. The following information must be provided in the documents: type and name of product, country of origin, exporter's name, manufacturer's name, type and number of transport means, port of loading and unloading, total pieces, packaging unit, gross and net weigh and product's quality basic data. If the same product is imported again, at it has been tested within 90 days, only visual check up is done. Both Entities have officially recognized laboratories to test imported food products

If a market inspector rejects an importer's request, goods are stored until the procedure is complete - the inspector can order the return or destruction of goods if necessary at the cost of importer, or can order certain changes prior to customs clearance.

III. Market Sector Structure and Trends

Domestic Industrial Capacity

Before the war, the food industry was concentrated into large state-owned companies that were also involved in primary agricultural production, processing and wholesale and retail operations. However, at the end of the war, the agro-processing industry was operating at less than 10% of its pre-war capacity due to heavy damage to buildings and equipment. In addition, the raw material supply and sales channels had been disrupted. The agricultural production and the food industry continued to suffer during the transition from a planned to a market economy. Many of pre-war companies are still being privatized and are racking up losses. There are still a few companies that have rebuilt successful fruit, vegetable, and meat processing operations.

In general, the BiH food industry is still too small and inefficient to compete with large foreign industries. Domestic food production is insufficient and covers approx. 30 – 35% of total needs.

Food Retail Sector

In general, small retailers are slowly losing out to large wholesalers with developed retail operations. Lately, appearance of shopping centers (malls) has been significant and has introduced big changes in the retail market. There are yet not many foreign retail chains, except Slovenian "Mercator", French Interex (discount house that attracts price-concerned consumers), Croatian "Velpro" (cash and carry) and Konzum, and Serbian C Market. Those centers import and distribute food and offer a great variety of fresh meat, exotic and new-to-market foods, and ready-to-eat foods. They also provide good professional service, restaurants with ready meals at favorable prices and lots of fun (performances for kids, clowns, and win prize games/ lottery). Quite often, they organize in-store promotions and tasting of products and provide small gifts with purchased products. A special discount is offered to faithful customers. Food items are also sold in a number of small independent groceries and open markets.

Hotel, Restaurant and Institutional (HRI)

Total turnover in catering 1998 –2004³

Year	Federation of BiH Total turnover (000 KM)	Republika Srpska Total turnover (000 KM)
1998	68,831	41,996
1999	66,794	50,566
2000	68,900	54,584
2001	60,784	48,312
2002	71,010	47,917
2003	76,270	53,046
2004	85,113	53,512

HRI prepare meals themselves. They buy ingredients from various suppliers, from small grocery stores and green markets to big producers, retail centers and wholesalers, depending on their size and the number of meals.

Tourism, tourism promotion, and the hospitality and catering industry have been regulated at the Entity level. This has resulted in business-inhibiting differences in requirements for companies and individuals working in the sector, differences in the way funding for tourism promotion is collected and distributed, and differences in the way accommodation is classified.

Lately, there has been a growing consensus that tourism can be a major source of job growth and foreign exchange earnings for Bosnia and Herzegovina. According to foreign experts, BiH has a large potential in niche market tourism and tapping into the world tourism market could have huge benefits for the BiH economy.

Promotional and Marketing Strategies

Advertising that used to be the single marketing tool in BiH is now combined with direct marketing (door-to-door contacts, material distribution and special offers). The most popular advertising media are television, radio, newspapers and magazines. In addition, outdoor advertising is becoming more and more popular (billboards, bulletins, and displays on in urban areas and frequent roads). Recent data indicates that 68 percent of advertising is conducted through TV, followed by 20 percent through outdoor advertising, while radio and

³ Sources : F BiH and RS Institutes for Statistics

print media account for 6 percent each (Country Commercial Guide 2004). Also, cable television is rapidly developing in urban areas of BiH. Radio is the most popular marketing tool at the local level. Direct mailing is also becoming popular advertising tool (leaflets placed under car windshield wipers, mailbox brochures, or advertising materials placed in newspapers). Quite often, in-store promotions and informal gatherings are used for presentations of the products. Supermarkets often deliver flyers, informing on their products, prices and special discounts

Trade events and fairs are good way to market products and services to BiH and to locate partners and distributors. The trade fair sector in BiH has been growing rapidly lately. Fairs provide opportunities for local and foreign companies to establish business connections. Trade events are held throughout BiH. The Sarajevo "Agro-food" fair is the most popular in the F BiH and for the RS the Banja Luka "Food and Beverages" fair. Regional centers like Zenica, Tuzla, Mostar and Bihac are very active in trade promotion.

Less than 11% of the BiH population uses the Internet regularly, and food sales, if any, are very small.

IV. Best High-Value Products Prospects⁴

PRODUCT	2001 IMPORTS (in million KM)	2002 IMPORTS (in million KM)	2003 IMPORTS (in million KM)	2004 IMPORTS (in million KM)
Tobacco products	98	152	153.4	121.5
Beverages and mineral water	96.6	106.6	110.3	94.7
Bear	63.6	73.4	72	93.3
Chocolate	58.3	77.9	84.2	87.5
Coffee	52.3	42	45.7	53.2
Cheese	35.4	32.5	35.7	47.3
Biscuits and cookies	30.7	36	43.5	47.7
Sauces and spices	30	29.2	30.9	35.2
Fish and Seafood	22.2	41.9	40.6	18.5
Wine	14	16.5	19.9	24.9
Ice-cream	10.3	11.2	13.9	11.9
Walnuts, almonds, hazelnuts, pistachios, peanuts	4.5	9.1	13.7	8.3

Currency note: US\$1.00 = KM 1.64

⁴ Source: Entities' statistical institutes, BiH Indirect Tax Administration and BiH Agency for Statistics

V. Key Contacts and Further Information

FAS/USDA
US Embassy to BiH
71000 Sarajevo
Bosnia and Herzegovina
Tel.: +387 33 445 700, x2099
Fax: +387 33 212 692
Contact person: Sanela Stanojcic
E-mail: Sanela.Stanojcic-Eminagic@usda.gov

State Veterinary Office
Radiceva 8/II
7100 Sarajevo
Contact person: Darko Cobanov
Bosnia and Herzegovina
Tel. +387 33 258 840
Fax +387 33 265 620
E-mail: info@vet.gov.ba
<http://www.vet.gov.ba/>

Administration for Plant Health protection
Musala 9/III
Contact Person: Sabaheta Cutuk, Deputy Director
71000 Sarajevo
Bosnia and Herzegovina
Te/fax. +387 33 668 672
E-mail: scutuk@bih.net.ba

Ministry of Foreign Trade and Economic Relations
Musala 9/II
71000 Sarajevo
Contact person: Marijo Perc
Tel. +387 33 663 863 (ext. 239)
Fax: +387 33 220 546
E-mail: perc@bih.net.ba

F BiH Ministry of Agriculture, Water Management and Forestry
Titova 15
71 000 Sarajevo
Bosnia and Herzegovina
Tel. +387 33 442 761
Fax: +387 33 206 638
<http://www.fbihvlada.gov.ba/engleski/index.html>

RS Ministry of Agriculture, Forestry and Water Management
Milosa Obilica 51
76300 Bijeljina
Contact person: Aleksandra Popovic
Tel: +387 55 201 856
Fax: +387 55 210 353
<http://www.vladars.net/lt/min/mps.html>
E-mail: mps@mps.vladars.net

Indirect Tax Administration
Contact person: Kemal Causevic, Director
Ulica Bana Lazarevica bb,
78 000 Banja Luka
Tel: +387 51 335 494
Fax: +387 51 335 101
<http://www.uino.gov.ba/>

American Chamber of Commerce in Bosnia and Herzegovina
Zmaja od Bosne 4, 71000 Sarajevo
Tel: 387-33-269-230 Fax: 387-33-269-232
Email: amcham@lsinter.net

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Institute for Accreditations of Bosnia and Herzegovina
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Hamdije Cemerlica 2/7
71000 Sarajevo
Phone: 387-33-715-560
Fax: 387-33-715-561
http://www.bata.gov.ba/bafiles/index_ba.htm

APPENDIX I. STATISTICS⁵

TABLE A. KEY TRADE & DEMOGRAPHIC INFORMATION	YEAR	VALUE
Agricultural Imports From All Countries (\$Mil) / U.S. Market Share (%) ^{1/}	2004	877/2
Consumer Food Imports From All Countries (\$Mil) / U.S. Market Share (%) ^{1/}	2004	142/2
Edible Fishery Imports From All Countries (\$Mil) / U.S. Market Share (%) ^{1/}	2004	14/0
Total Population (Millions) / Annual Growth Rate (%)	2004/ 2003	3,828/ 0.7
Urban Population (Millions) / Annual Growth Rate (%)	n/a	n/a
Number of Major Metropolitan Areas ^{2/}	2002	0
Size of the Middle Class (Millions) / Growth Rate (%)	n/a	n/a
Per Capita Gross Domestic Product (U.S. Dollars)	2004	2,150
Unemployment Rate (%)	2004	43.2%
Per Capita Food Expenditures (U.S. Dollars) ^{3/}	2004	875
Percent of Female Population Employed	2000	34.5%
Exchange Rate	2/14/06	US\$1.00 = 1.64 KM
Footnotes:		
^{1/} Data from FAS' web-enabled UNTrade database (HS 6-digit option; Import Market Share BICO 3-Year format)		
^{2/} There are no metropolitan areas with population in excess of 1,000,000		
^{3/} The figure presents food expenditures for a basket composed of necessary food products.		

⁵ Sources: BIH Agency of Statistics, FBIH and RS Institutes of Statistics

TABLE B. CONSUMER FOOD & EDIBLE FISHERY PRODUCT IMPORTS

Bosnia-Herzegovina Imports (In Millions of Dollars)	Imports from the World			Imports from the U.S.			U.S. Market Share		
	2002	2003	2004	2002	2003	2004	2002	2003	2004
BULK AGRICULTURAL TOTAL	NA	57	125	NA	6	5	0	11	4
Wheat	NA	26	60	NA	6	4	0	22	7
Coarse Grains	NA	1	5	NA	0	0	0	0	0
Rice	NA	3	3	NA	0	0	0	0	0
Soybeans	NA	1	2	NA	0	1	0	0	2
Other Oilseeds	NA	1	10	NA	0	0	0	0	0
Cotton	NA	1	3	NA	0	0	0	0	0
Tobacco	NA	9	7	NA	1	1	0	3	3
Rubber & Allied Gums	NA	1	1	NA	0	0	0	0	0
Raw Coffee	NA	9	21	NA	0	1	0	0	0.34
Cocoa Beans	NA	1	1	NA	0	0	0	0	0
Tea (Incl. Herb Tea)	NA	1	1	NA	0	0	0	0	0
Raw Beet & Cane Sugar	NA	3	9	NA	0	0	0	0	0
Pulses	NA	4	3	NA	1	1	0	3	0
Peanuts	NA	1	1	NA	0	0	0	0	0
Other Bulk Commodities	NA	1	1	NA	0	0	0	0	0
INTERMEDIATE AGRICULTURAL TOTAL	NA	167	213	NA	1	6	0	0	3
Wheat Flour	NA	1	4	NA	0	0	0	0	0
Soybean Meal	NA	1	12	NA	0	1	0	0	1
Soybean Oil	NA	1	1	NA	0	0	0	0	0
Vegetable Oils (Excl. Soybean Oil)	NA	37	48	NA	1	6	0	0.01	12
Feeds & Fodders (Excl. Pet Foods)	NA	8	28	NA	0	1	0	0	0.01
Live Animals	NA	45	33	NA	0	0	0	0	0
Hides & Skins	NA	4	11	NA	0	0	0	0	0
Animal Fats	NA	1	1	NA	0	0	0	0	0
Planting Seeds	NA	3	9	NA	0	1	0	0	0.30
Sugars, Sweeteners, & Beverage Bases	NA	46	43	NA	0	1	0	0	0.02
Essential Oils	NA	8	8	NA	0	1	0	0	0.80
Other Intermediate Products	NA	12	16	NA	0	1	0	0	0.99
CONSUMER-ORIENTED AGRICULTURAL TOTAL	NA	389	539	NA	2	3	0	0.52	0.64
Snack Foods (Excl. Nuts)	NA	48	86	NA	0	1	0	0	0.18
Breakfast Cereals & Pancake Mix	NA	2	3	NA	0	0	0	0	0
Red Meats, Fresh/Chilled/Frozen	NA	19	18	NA	0	0	0	0	0
Red Meats, Prepared/Preserved	NA	24	37	NA	0	0	0	0	0
Poultry Meat	NA	8	10	NA	0	0	0	0	0
Dairy Products (Excl. Cheese)	NA	42	41	NA	0	0	0	0	0
Cheese	NA	16	22	NA	0	0	0	0	0
Eggs & Products	NA	1	2	NA	0	0	0	0	0
Fresh Fruit	NA	39	47	NA	0	0	0	0	0
Fresh Vegetables	NA	11	20	NA	0	1	0	0	0.15
Processed Fruit & Vegetables	NA	18	20	NA	1	1	0	0.09	0.16
Fruit & Vegetable Juices	NA	2	11	NA	0	1	0	0	0.30

Tree Nuts	NA	4	4	NA	1	1	0	7	12
Wine & Beer	NA	31	63	NA	0	0	0	0	0
Nursery Products & Cut Flowers	NA	6	9	NA	0	1	0	0	0.11
Pet Foods (Dog & Cat Food)	NA	1	2	NA	0	0	0	0	0
Other Consumer-Oriented Products	NA	115	142	NA	2	3	0	2	2
FOREST PRODUCTS (EXCL. PULP & PAPER)	NA	38	51	NA	1	1	0	0	0.02
Logs & Chips	NA	1	2	NA	0	0	0	0	0
Hardwood Lumber	NA	1	3	NA	0	0	0	0	0
Softwood and Treated Lumber	NA	1	1	NA	0	0	0	0	0
Panel Products (Incl. Plywood)	NA	22	32	NA	0	0	0	0	0
Other Value-Added Wood Products	NA	13	14	NA	1	1	0	0.01	0.06
FISH & SEAFOOD PRODUCTS	NA	17	21	NA	1	1	0	0.53	0.91
Salmon	NA	1	1	NA	1	1	0	3	14
Surimi	NA	1	1	NA	0	0	0	0	0
Crustaceans	NA	1	1	NA	0	0	0	0	0
Groundfish & Flatfish	NA	3	5	NA	1	0	0	0.27	0
Molluscs	NA	1	2	NA	1	1	0	6	10
Other Fishery Products	NA	13	14	NA	1	0	0	0.11	0
AGRICULTURAL PRODUCTS TOTAL	NA	613	877	NA	8	14	0	1	2
AGRICULTURAL, FISH & FORESTRY TOTAL	NA	669	950	NA	8	15	0	1	2

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office

TABLE C. TOP 15 SUPPLIERS OF CONSUMER FOODS & EDIBLE FISHERY PRODUCTS
CONSUMER-ORIENTED AGRICULTURAL TOTAL

Reporting Country:	Import		
Bosnia-Herzegovina	2002	2003	2004
Top 15 Ranking	1000\$	1000\$	1000\$
Croatia	0	104,308	128,339
Serbia & Montenegro	0	6,134	112,808
Slovenia	0	70,315	72,272
Austria	0	28,171	34,182
Germany	0	27,067	30,372
Italy	0	26,807	24,811
Netherlands	0	18,330	23,681
Poland	0	18,656	19,135
Ecuador	0	17,512	14,344
Turkey	0	6,997	13,473
Hungary	0	13,601	12,443
Spain	0	6,878	7,170
Macedonia (Skopje)	0	2,940	5,334
Greece	0	3,327	4,820
United States	0	2,011	3,443
Other	0	35,782	32,337
World	0	388,861	539,015

NA - Data not available (not reported) Data: Harmonized Tariff Schedule (HS 6 Digit)

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office

FISH & SEAFOOD PRODUCTS

Reporting Country:	Import		
Bosnia-Herzegovina	2002	2003	2004
Top 15 Ranking	1000\$	1000\$	1000\$
Croatia	NA	7,425	6,040
Argentina	NA	2,487	3,360
Spain	NA	1,291	2,825
Thailand	NA	1,240	2,167
Italy	NA	1,789	1,611
Slovenia	NA	1,336	1,215
Germany	NA	208	622
Philippines	NA	4	404
Morocco	NA	2	340
Lithuania	NA	52	254
Serbia & Montenegro	NA	4	245
Chile	NA	54	221
United States	NA	92	191
Turkey	NA	99	189
Indonesia	NA	0	166
Other	0	1,211	1,150
World	0	17,301	21,005

NA - Data not available (not reported) Data: Harmonized Tariff Schedule (HS 6 Digit)

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office